DOCUMENT RESUME

ED 179 005 EA 012 110

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TITLE Teaching-Learning Strategies and Educational Planning. IIEP Seminar Paper: 28.
INSTITUTION United Nations Educational, Scientific, and Cultural Organization, Paris (France). International Inst. for Educational Planning.
PUB DATE 77
NOTE 13p.; A contribution of the IIEP Seminar on "Teaching-learning strategies and educational planning" (March 8-12, 1976)

EDRS PRICE MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS Adoption (Ideas); *Educational Planning; *Educational Strategies; Elementary Secondary Education; Experimental Programs
IDENTIFIERS *Teaching Learning Strategies

ABSTRACT

The purpose of this paper is to describe a few planning issues to be borne in mind when discussing the presentation of a teaching-learning strategy. Three general areas are discussed: the socioeconomic context (the diagnostic phase), the developmental stage (the experimental stage), and the implementation phase. The first step in the planning process is diagnosis. In order for it to be useful, the diagnostic phase should lead to a number of specific conclusions concerning three areas: the kind of imbalances in the socioeconomic setting and in the educational system, the short- and long-term challenges facing the educational system, and the priority issues to be tackled by educational planners. The developmental stage addresses the questions of why the change was started, who paid for what in the testing of the developed strategy, how the plan was undertaken, and the means planned to compare expectations from the strategy with the results of the adoption. The implementation phase should address pedagogical, legal, economic, and organizational problems. (Author/IRT)

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IIEP seminar paper: (28)

TEACHING-LEARNING STRATEGIES AND EDUCATIONAL PLANNING

Jacques Hallak

A contribution of the IIEP Seminar on "Teaching-learning strategies and educational planning"
8-12 March 1976

INTERNATIONAL INSTITUTE
FOR EDUCATIONAL PLANNING
(established by Unesco)
7-9, rue Eugène-Delacroix, 75016 Paris

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CONTENTS

		Page
1.	The socio-economic context: the diagnostic phase	1
2.	The development stage (or the experimental phase) : why? who? how? and what?	2
3.	The implementation phase: introducing the strategy on a national basis	5

"TLS AND EDUCATIONAL PLANNING"

Each TLS has implications for the way in which educational resources are used at national, regional and institutional levels. Each TLS can be implemented in different ways and with different assumptions, according to the context in which it is applied.

If planning includes such things as:

- a careful diagnosis of the socio-economic context to which it is applied

- an explicit definition of aims and goals, means and constraints,

then the adoption of any TLS cannot seriously be considered without a clear specification of the planning system in which it operates.

If planning means:

- allocation of resources and their effective uses

- reaching some consistencies between decisions made and means to achieve them

- understanding the significance of alternative decisions,

then each TLS has obvious implications for educational planning.

The purpose of this paper is to describe a few planning issues to be borne in mind when discussing the presentation of a TLS. The description is by no means exhaustive.

1. The socio-economic context: the diagnostic phase

The first step in the planning process - whatever the meaning of planning is - is diagnosis. Hence, prior to any presentation and assessment of a TLS, it is important to describe carefully:

- the socio-economic setting. How does it operate? What are its mean features? What are the issues at stake? To document this, a conceptual framework for analysis is needed, which helps towards asking the "right" questions and identifying the real issues. Being in a capitalist or socialist country, in a large or small entity with one historical background or another, in a rich or poor region, in a stable or unstable political setting, etc. is not indifferent;

- the educational setting. How does it operate? How is it viewed in the socio-economic setting? (Importance of its role? Kind of influence ...). What are the main features? (Viewed dynamically and historically). What are the issues? (i.e. graduate unemployment? UPE? Illiteracy? Women's education? Conditions of schooling? Resource constraints? Lack of co-ordination? Lack of effective administration? etc.).

In order for it to be useful, the diagnosis phase should lead to a number of specific conclusions on:

- the kind of imbalances in the socio-economic setting, and the educational systems;

- the short- and long-term challenges facing the educational systems;

- some priority issues to be tackled by educational planners.

2. The development stage (or the experimental phase): why? who? how? and what?

If the main purpose of the seminar is to examine the policy implications of alternative teaching-learning strategies from the point of view of educational planners, the presentation and discussion of each strategy presented should seek to give answers to four main

questions: why? who? how? what?

2.1. Why? Given the issues (spelt out under 1.) facing the educational system of the country, why has the programme been started? What implicit (or explicit) assumptions were made on the implications of the programme in solving the issue? On what basis? i.e. What theory or conceptual framework has been used to justify the experiment? What were the main reasons for starting the experiments? (Saving resources? (personnel, time, equipment); improving performance? (limiting drop-out; helping the handicapped children; serving the minority groups ...); in the context of a major educational region? (restructuring the system; introducing new subjects; adopting a national language ...) ; simply for the purpose of carrying out a pedagogical research-experimentation or for other reasons (specify))?

2.2. Who? Who has paid (what?) in the testing of the developed strategy on an experimental basis? (the schools? the regional educational administration? the educational research centre? any special grants? from whom? voluntary contributions of personnel? any contribution in mind? etc.).

Was it initiated by:

i) a policy-making group? on what basis?

ii) an administrative body within the Ministry of Education?

iii) an administrative body outside the Ministry of Education (specify)?

iv) a research centre with or without connections with the decision-making and/or planning and/or administrative machinery?

(v) specify (an inter-departmental group; a foundation ...).

It is relevant to spell out the nature of inter-action between the initiator(s) of the programme and the educational policy-makers in the country (for example degree of commitment to the "follow-up").

2.3. How? How was the plan undertaken for the initiation of the experiments, i.e. spell out the steps adopted for carrying out the experiment. How were schools or classes selected at the pilot stage? What "grades" and subjects and why? How was it planned to adjust to the feedback from evaluations? Were any foreseeable resistances expected and was any way for overcoming them planned? (for example, in some countries it is easy to expect a very strong resistance by parents if the programme implies a strong participation of pupils in decisions about class organization as is the case in strategies A and B). What are the cost implications of (i) adoption of the strategy (essentially administrative and general services, but also on equipment, building, etc.) (ii) applying the strategy on an experimental basis (production, distribution of teaching materials; teacher training systems; re-organization of the use of time for teachers; building and equipment; pupils; other pedagogical and non-pedagogical personnel; evaluation and feedback; adjustment, etc.)? How has the adoption and development of the strategy been supported? (from a regular budget? whose? any incidence on other alternative activities?). How effectiveness is being measured? (pupils' time? teachers' time? test scores? - with reference to the aims of the strategy).

2.4. What? What was planned to compare expectations from the strategy and the results of its adoption? If the results are convincing, is there any specific time schedule for implementing the experiment on a wider scale in the whole country? The answer to the first question is in the form of an evaluation of the project implementation. (This raises

many difficulties educational evaluation usually faces (both methodological and practical). The answer to the second question should be more factual (yes or no): were any broad or precise development plans prepared? If 'yes', then see (3).

3. The implementation phase: introducing the strategy on a national basis

If a development programme is to be helpful, it should be planned in such a way as to give information on the implication of implementing it on a wide scale. Otherwise, it will remain an "experiment" and as such cannot really affect the policy and planning of the education system within which it is carried out. Hence, it is hoped that as various TLS are described and discussed at the Seminar, contributors will highlight the main issues when a generalization of the experiment is contemplated on a wide scale.

The generalization raises a few pedagogical, legal, economic and organizational problems. To illustrate:

- pedagogical: assuming the programme covers nationally two grades in primary education, (with three subjects), what will happen when students move from one subject with a non-conventional strategy to a subject with a conventional strategy, and when they move from the grades with a non-conventional strategy to other grades, and from primary to secondary education. This question is all the more important for planners, if the dimensions of the programme strategy differ significantly from those of the conventional TLS in the country, i.e. if the programme strategy is, say, in category A and the conventional strategy is, say, in category E, is there, from the planner's point of view, a lack of consistency leading to questioning seriously the generalization of the experiment to two grades in primary, without

pursuing the generalization throughout the school system. Even in the case of a complete change of the whole school system, the question remains important for those pupils who will be in the transitional phase:

- legal: assuming the programme strategy shows that the teacher's work conditions, duration of work, etc. would be in conflict with the general rules of the civil service, special legal arrangements might be needed to introduce the strategy on a national scale. For example, where strategies have different children moving through individual programmes of their own choice, the teacher might need to spread the hours of his working day differently, (and he might judge this as unacceptable). Some strategies require the classroom teacher to have helpers; these may be other teachers, less qualified teachers, parents, older students, etc. Some categories of aides would have to be "legally" created (conditions of selection, status, salaries, etc.); for other categories, it can be illegal to use them unless on a purely voluntary basis, etc.;

- economic: when moving from a pilot experiment to a national programme, the changes in the scale of operation and its scope, are such that it is not significant to use average cost estimates of the pilot effort to compute the cost implications of the adoption of the strategy. Instead of average cost, we should use development costs (this includes development, testing and evaluation of teaching materials, teacher training, etc.). To do so, it is necessary to compare the situation prevailing prior to the adoption of the strategy with the expected situation (simulate the scenario) resulting from the use of the strategy on a wide scale. This requires a detailed description (spelling out) of the amount of resources needed and the method to be used. It is not only teachers, other personnel, programme of instruction, etc., it is also some specific needs of strategies: for example,

(drawing from T. N. Postlethwaite's paper IIEP/RP/14/8):

"For some strategies (e.g. programmed instruction) large cupboards with pigeon-holes are required for all the different learning units and/or tests. How big these are and where they are placed is associated with the ease or difficulty (and classroom disturbance) of students using them freely and frequently. Other strategies require the students to store their own materials and others for students to share materials.

What special storage arrangements are associated with different strategies and what types of difficulties are encountered?

Some strategies are structured such that immediate remedial work can take place on demand.

Which strategies require spare space (of what kind), how and when is it used - with what sorts of associated problems?

Some strategies require the classroom teacher to have helpers. These may be other teachers, less qualified teachers, parents, older students, students from the same class, etc.

What strategies require what kinds of teacher aides and what are the problems of "teacher aide" selection and use?"

Finally and most importantly, for planners the financial implications should be studied carefully. It is hoped that the discussants of the experiments will give some indications on how the extra costs of implementing the strategy are likely to be met. Who would finance the production of the programme on a wide scale? Who would finance the training and retraining of teachers? Who would finance the additional space required? etc.

- organizational: the problems are both at the global and institutional levels. Here are a few illustrations:

(a) global level

- going from a conventional to a non-conventional strategy means a careful chronological programming of the numerous operations involved (production, teacher-training, curriculum development, evaluation, etc.). A simplified PERT chart may well be needed;
- assuming the non-conventional strategy means an alteration in the calendar of the school year, (or even of the duration of schooling), a practical set of organizational problems will have to be solved and particularly so, in view of the fact that only a sub-system of the educational system is involved in the adoption of the new strategy;
- assuming the non-conventional strategy, when introduced on a wide scale requires a different physical layout of the classrooms and the schools leading to changing the size of the schools, the various educational services offered, and their recruitment areas, it is necessary to study the methods for reconverting the stock of school premises and their spatial distribution over the country. This is a typical "school-map" problem (or planning the location of schools) which cannot be solved without a re-organization of the school network, through the introduction of central and satellite institutions (nuclearization).

(b) institutional level

- the reader is referred back to the paper by T. N. Postlethwaite (IIEP/RP/14/8) which describes such aspects as the "structural alterations", "furniture and equipment", "grading and ability grouping", "co-ordination

of programmes at school level", etc. We would like to add that the organizational implications can be sufficiently significant to warrant a redesigning of the school building standards in the country (as floor space, arrangement of desks, recreation facilities, didactic materials, audio-visual aids, etc. can be different in the new strategy).

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